

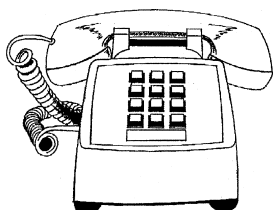
Wisconsin income tax

TeleFile instructions

2002

File Your Taxes by Phone

Wisconsin TeleFile



**Quick! Easy!
Refunds are Fast!**

New this year!

- Married persons with no dependents may now use TeleFile to file a joint return. See page 3.
- You may use TeleFile even if you have moved. Contact the department to change your address. See page 2.
- If you qualify to file by phone, you may use TeleFile even if you did not receive a booklet in the mail. See page 2.
- TeleFile is now paperless. You do not have to mail in your W-2s or a signature form.

File Early:

TeleFile begins January 15

FEDERAL PRIVACY ACT In compliance with federal law, you are hereby notified that the request for your social security number on the Wisconsin income tax return is made under the authority of Section 71.03(6)(a) of the Wisconsin Statutes. The disclosure of this number on your return is mandatory. It will be used for identification purposes throughout the processing, filing and auditing of your return and the issuance of refund checks.

File Electronically!

Use TeleFile!

You were selected to receive this special 2002 income tax booklet based on the information on your tax return last year. If you are still eligible, this booklet allows you to file your Wisconsin individual income tax return by telephone.

If you meet ALL the requirements listed on page 3, please try TeleFile. You'll find ...

- Fast refunds
- Easy filing
- Convenience: File from your home 7 days a week, 24 hours a day.

Note: The system may be unavailable between 5:00 a.m. – 8:00 a.m. on Sundays due to routine maintenance.

TeleFile is available to taxpayers who meet all the TeleFile requirements listed on page 3. If you meet all these requirements and want to use TeleFile, but did not receive a TeleFile booklet in the mail, contact the department to get a personal identification number (PIN). See contact information below.

If you're not able to use TeleFile due to impaired hearing, please try one of the other e-file methods listed in the next column.

Other Ways to Electronically File!

If you can't TeleFile because you do not meet ALL requirements, other electronic filing options are available.

Note: Most public libraries have computers available to the public.

➤ ***Wisconsin Free File (NEW)***

These forms are available FREE on the Department of Revenue's web site at www.dor.state.wi.us. These Wisconsin forms may be submitted electronically after you complete them.

➤ ***Free electronic filing***

You may be eligible to file your federal and state income tax returns electronically for FREE. Visit our web site at www.dor.state.wi.us to see if you qualify.

➤ ***Tax professional***

Check your local telephone directory or visit our web site at www.dor.state.wi.us for the names of tax professionals who can file your federal and Wisconsin income tax returns electronically.

➤ ***Tax preparation software***

File electronically using tax preparation software. You may purchase off-the-shelf tax preparation software for installation on your personal computer, or you may connect to one of the web sites that offer electronic filing. Visit our web site at www.dor.state.wi.us for more information.

How to Contact the Department of Revenue

- If your address is not the same as on the mailing label on this booklet:

Contact us by: e-mail* at telefile@dor.state.wi.us or call (608) 266-2772

Provide your full name, social security number, old address, and new address.

* If you contact us by e-mail, do not TeleFile your return until after you receive confirmation that the department has changed your address. Filing before confirmation is received will cause any refund to be sent to your old address.

- If you qualify to use TeleFile but did not receive a booklet with a PIN, or if you have questions about filing your return using TeleFile:

Contact us by: e-mail at efiling@dor.state.wi.us or call (608) 264-6886

Wisconsin TeleFile

File Your Wisconsin Income Tax Return by TeleFile – It's Easy.

1 Fill in Worksheet ...

See page 5.



2 Use your telephone to file your tax return.

See page 4 for the number to call.

3 If you owe money, file now and pay by April 15, 2003 ...

See page 11.

4 Keep Worksheet for your records.

You Can File by Phone if:

- We have your correct address. Unless you give us a different address, your refund will be mailed to the address on the mailing label on the front cover of this booklet. If the mailing label address is wrong, see page 2 for how to contact the department to correct your address.
- Your filing status is single or married filing a joint return and you have no dependents. If married, you must be married to the same spouse as shown on your 2001 return.
- You (and your spouse if married) do not have more than eight W-2s.
- You (and your spouse if married) only had income from the following sources:
 - wages, salaries, tips
 - taxable scholarship or fellowship grants
 - taxable interest income
 - unemployment compensation
- All wages, salaries, tips, and taxable scholarship or fellowship grants are included in box 1 on your W-2s.
- You (and your spouse if married) were under age 65 on December 31, 2002.
- You (and your spouse if married) were a full-year Wisconsin resident for 2002.
- You do not claim any deductions (for example, a deduction for student loan interest).
- You do not claim any Wisconsin credits other than credit for Wisconsin tax withheld from wages, renter's and homeowner's school property tax credit, married couple credit, and the working families tax credit.
- You have use of a touch-tone telephone. (For best results, don't use a cellular or cordless phone or one with a keypad in the handset.)

See page 4 to find out how to file.

If you cannot use TeleFile, see page 2 for information on other methods of electronic filing or page 10 for information on how to get tax forms.

Your refund or the amount you owe will be calculated for you while you file.

Refunds will usually be mailed within one week. Refunds for returns selected for review or returns that are adjusted will take longer.

If you owe money, you can file now and pay by April 15. See page 11 for details.

Here's How To File Using TeleFile

- Make sure you have *all* your W-2s from *all* jobs you had during 2002.
- Find the mailing label on the front cover of this booklet and locate the 4-digit personal identification number (PIN). (If you do not have a mailing label and you meet all of the requirements listed on page 3, see page 2 for how to contact the department to obtain a PIN.)

First person on the label

4-digit PIN

T *****ECRLOT**RR001

WI ID#: 475 285 274 8

TAXPAYER TAXPAYER

JAMES P. HELEN A.

6543

16305 MAIN AVENUE, N.W.

ANYTOWN, WI 99999-9999

- Fill in lines **A** through **K** on the Worksheet on the next page.
- Call TeleFile using a touch-tone phone. Call one of the numbers appearing below. Long-distance charges will apply, if applicable.

Call (608) 261-7777 (Madison)

Call (414) 220-6000 (Milwaukee)

If you get a busy signal, please try again.

- To STOP the filing of your return at any time, simply hang up. Your return will not be filed unless you confirm at the end of the call that you wish to file.
- TeleFile will tell you the numbers to write on lines L through N.
- When you have finished filing and the department has accepted your information, write down the confirmation number on line O of your worksheet.
- If you owe an additional amount, submit your payment by April 15, 2003 (see page 11 for payment voucher). If you prefer to pay by credit card, make your payment online at www.officialpayments.com or by calling 1-800-272-9829 (see page 7).
- Keep your completed worksheet for your records.

TeleFile will accept returns from January 15 through midnight October 15 (CST)

2002 Wisconsin TeleFile Worksheet

Do not mail worksheet.
Keep for your records.

5

Fill in lines A-K before you call. If you need help, see page 8.

A Fill in your social security number or, if married, the social security number of the first person on the mailing label on the front cover of this booklet (see "sample" label on page 4)

If married, fill in the social security number of the person listed second on the label . .

B Fill in your 4-digit PIN found on the mailing label on the front cover of this booklet. (The "sample" label on page 4 indicates where the PIN can be found on your mailing label.)

C Do you want \$1 to go to the State Election Campaign Fund? ☐ Yes ☐ No

If married, does your spouse want \$1 to go to the State Election Campaign Fund? ☐ Yes ☐ No
(Checking "Yes" will not change your tax or reduce your refund.)

D Can your parents (or someone else) claim you as a dependent on their 2002 tax return? ☐ Yes ☐ No

If married, can your spouse's parents (or someone else) claim him/her as a dependent on their 2002 tax return? ☐ Yes ☐ No

E Fill in the number of your W-2s. If married, fill in the number of your spouse's W-2s.

Fill in the federal employer identification number, the amount of wages, and the **Wisconsin income tax withheld** as shown on each W-2 (see sample W-2 on page 8). Round all amounts to the nearest dollar – **do not include cents**. (For example, \$457.50 becomes \$458 and \$634.49 becomes \$634). If married, list your W-2s first and then list your spouse's W-2s. For each W-2, check the box to show whether the W-2 belongs to you or your spouse.

Check one box for each W-2.

	Your W-2	Spouse's W-2	Federal Employer Identification Number (Box b of W-2)	Wages (Box 1 of W-2) Dollars Only	Wisconsin Income Tax Withheld (Box 17 of W-2) Dollars Only
(1)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
(2)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
(3)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
(4)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
(5)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
(6)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
(7)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
(8)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

F Did you (or your spouse if married) receive unemployment compensation in 2002? ☐ Yes ☐ No
If yes, fill in: (see page 9)

(1) Total unemployment compensation Dollars Only

(2) Total interest income, if any, from U.S. Government bonds

(3) Total Wisconsin income tax withheld from box 11 of Form 1099-G

NOW GO TO THE BACK OF THE WORKSHEET →

6
2002 Wisconsin TeleFile Worksheet (continued)



G If you (or your spouse if married) had taxable **interest income**, fill in the total dollar amount from your 1099-INT form(s) or other statements. Do not include interest income from U.S. Government bonds Dollars Only

H (Before completing line H, see the instructions on page 9.)
 If you paid rent during 2002 for living quarters used as your primary residence or you paid property taxes during 2002 on your home, fill in the amount of: Dollars Only

(1) Rent paid where **landlord included heat**

(2) Rent paid where you paid **heat separate from rent**

(3) Property taxes paid on home in 2002

I If you made taxable purchases from out-of-state firms during 2002 and did not pay a sales and use tax, fill in the amount of these purchases Dollars Only

J If you wish to donate to the Endangered Resources Fund, fill in the amount you wish to donate. Your donation will decrease your refund or increase the amount you owe Dollars Only

K If you wish to donate to the Packers football stadium, fill in the amount you wish to donate. Any donation will be used for maintenance and operating costs of the professional football stadium in Green Bay. Your donation will decrease your refund or increase the amount you owe Dollars Only

Call Wisconsin TeleFile (608) 261-7777 (Madison) or (414) 220-6000 (Milwaukee). TeleFile will tell you the amounts you should write in spaces L through N below.

L Income, Standard Deduction, Exemption Amount, Tax, Credits, and Sales and Use Tax.

<input type="text"/> Wisconsin Income	<input type="text"/> Standard Deduction	<input type="text"/> Exemption Amount	<input type="text"/> Tax
<input type="text"/> School Property Tax Credit	<input type="text"/> Working Families Tax Credit	<input type="text"/> Married Couple Credit	<input type="text"/> Sales and Use Tax

M Amount of Your Refund
 OR
 Your Refund Amount

N Amount You Owe. Pay by April 15, 2003 (see page 11 for payment voucher)
 Amount You Owe

Note: If at this point you feel you may have made an error, disconnect the TeleFile call and start again.

O Stay on the line until the system tells you your return has been accepted and gives you a confirmation number
 Confirmation Number

P Fill in the date of your TeleFile call
 Filing Date

Keep this worksheet for your records.

General Instructions

The information below only applies to individuals eligible to use TeleFile. If you are not eligible, see page 10 for information on how to get tax forms. You may be eligible for FREE electronic filing. To see if you qualify, visit our web site at www.dor.state.wi.us.

Do You Have To File?

You must file a Wisconsin income tax return for 2002 if:

- Your gross income during 2002 was \$9,000 or more (\$18,000 or more if married filing a joint return), or
- You could be claimed as a dependent on someone else's return and (1) you had gross income of more than \$750 which included at least \$251 of nonwage income, or (2) your gross income was more than \$7,650 (\$13,770 if married filing a joint return).

Even if you don't have to file, you should file to get a refund if you had Wisconsin income tax withheld from your wages.

When Should You File?

TeleFile is open until October 15, 2003. However, if you owe additional tax, you will be subject to interest on any tax not paid by April 15, 2003.

Is Your Address on the Mailing Label Correct?

You may use TeleFile even if your current address is different than the address shown on the mailing label on the front cover of this booklet. However, before you use TeleFile, you must first contact the department and give us your new address. See page 2 for how to contact the department.

How Do You Pay an Amount You Owe?

If you owe tax, you may pay by check, money order, or credit card.

To pay by check or money order Make your check or money order payable to the Wisconsin Department of Revenue. Write your social security number on your check or money order. Send your payment along with 2002 Form TPV (see page 11 for a copy of 2002 Form TPV) to:

Wisconsin Department of Revenue
PO Box 2942
Milwaukee, WI 53201-2942

To pay by credit card You may use your MasterCard®, Visa® Card, American Express® Card or Discover® Card. To pay by credit card, call toll free or access by Internet the service provider listed below and follow the instructions of the provider. A convenience fee of 2.5% (with a minimum of \$1) will be charged by the service provider based on the amount you are paying. You will be told what the fee is during the transaction and you will have the option to either continue or cancel the transaction.

Official Payments Corporation
1-800-2PAY-TAX (1-800-272-9829)
1-866-621-4109 (Customer Service)
www.officialpayments.com

Your credit card payment must be made on or before April 15, 2003.

How Long Should You Keep Your Worksheet?

Keep your Wisconsin TeleFile Worksheet and records of all items appearing on it (such as W-2 and 1099 forms) until the statute of limitations runs out for that return. For most returns, this is 4 years from the due date of the return.

How Do You Amend Your Return?

If you complete and confirm filing your return using TeleFile and discover an error or receive additional W-2s, you must file an amended return.

You can amend your return by filing Wisconsin Form 1X. To amend your return, you will need the amounts on lines L through N of your Worksheet. The amounts on these lines are needed to complete Form 1X.

Generally, an amended return must be filed within 4 years after the unextended due date of the original return.

Interest and Penalties

If you do not file an income tax return which you are required to file, or if you file an incorrect return due to negligence or fraud, penalties and interest may be assessed against you. The interest rate on delinquent taxes is 18% per year. Civil penalties can be as much as 100% of the amount of tax not reported on the return. Criminal penalties for failing to file or filing a false return include a fine up to \$10,000 and imprisonment.

Need Help With Your Worksheet?

Note: All amounts filled in on your TeleFile Worksheet and entered by telephone must be rounded to the nearest dollar. To do so, drop amounts under 50 cents and increase amounts from 50 cents to 99 cents to the next whole dollar. For example, \$129.39 becomes \$129 and \$236.50 becomes \$237.

Line A

If you are single, fill in your social security number. If you are married, fill in the social security number of the first person listed on the mailing label on the cover of this booklet and then fill in the social security number of the second person listed on the label. See sample label on page 4 to identify the first person.

Note: If you became married or divorced in 2002, you cannot use TeleFile.

Line E

Round all amounts to the nearest dollar. Do **not** fill in cents.

If married, list all your W-2s first and then list your spouse's W-2s.

From each W-2, fill in the:

- Employer identification number from box b
- Wages from box 1
- Wisconsin income tax withheld from box 17

Be sure that Wisconsin is listed as the state in box 15 of each W-2.

See the sample W-2 below.

Note: If you have more than eight W-2s, you cannot use TeleFile.

Employer identification number →

Verify that WI is shown in this box. You cannot TeleFile if any other state is shown here. →

Wages (In this sample, the amount to enter is "22565.")

a Control number		22222		Void <input type="checkbox"/>		For Official Use Only ▶ OMB No. 1545-0008	
b Employer identification number 123456789				1 Wages, tips, other compensation \$ 22,564.82		2 Federal income tax withheld \$	
c Employer's name, address, and ZIP code				3 Social security wages \$		4 Social security tax withheld \$	
				5 Medicare wages and tips \$		6 Medicare tax withheld \$	
				7 Social security tips \$		8 Allocated tips \$	
				9 Advance EIC payment \$		10 Dependent care benefits \$	
				11 Nonqualified plans \$		12a See instructions for box 12 \$	
d Employee's social security number				13 Statutory employee <input type="checkbox"/> Retirement plan <input type="checkbox"/> Third-party sick pay <input type="checkbox"/>		12b See instructions for box 12 \$	
				14 Other		12c See instructions for box 12 \$	
						12d See instructions for box 12 \$	
e Employee's first name and initial				Last name			
f Employee's address and ZIP code							
15 State	Employer's state ID number	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.	19 Local income tax	20 Locality name	
WI		\$	\$ 335.15	\$	\$		
		\$	\$	\$	\$		

Form **W-2** Wage and Tax Statement **2002**

Department of the Treasury-Internal Revenue Service
For Privacy Act and Paperwork Reduction Act Notice, see separate instructions.

Wisconsin income tax withheld. (In this sample, the amount to enter is "335.")

■ Line F

You should receive a Form 1099-G showing the total unemployment compensation paid to you in 2002. In order for TeleFile to determine how much of your unemployment compensation is taxable, you must indicate on line F(2) if you received any interest from U.S. government bonds. (**Note:** You will not be taxed on the U.S. government interest.)

■ Line H

Renters Fill in the total rent you paid during 2002 for living quarters that were used as your principal home. Do not include rent paid for housing that is exempt from property tax (for example, a university dormitory). Property owned by a public housing authority is considered exempt from property taxes, unless that authority makes payments in place of property taxes to the city or town in which it is located.

If the rent you paid included food, housekeeping, medical, or other services, reduce the amount filled in for rent paid in 2002 by the value of these items. If you shared living quarters with one or more persons, fill in only the portion of the rent you paid in 2002.

In some cases, heat is included in the monthly rental charge. In other cases, the tenant separately pays an amount for heat. If the heat was included in your monthly rental charge, fill in the amount of rent paid on line H(1). If you paid for heat separately each month, fill in the amount you paid for rent on line H(2). Do not include any amount paid for heat on line H(2).

Homeowners If you owned the property used as your principal home, fill in the amount of property tax you paid on that home in 2002 on line H(3).

Note Although it is possible that some individuals will fill in amounts on all three lines [H(1), H(2), and H(3)], most individuals will fill in only one line.

■ Line I

If, during 2002, you made any taxable purchases from out-of-state firms on which sales and use tax was not charged, you must pay Wisconsin sales and use tax on these purchases if they were stored, used, or consumed in Wisconsin. Taxable purchases include furniture, carpet, clothing, computers, books, CDs, cassettes, video tapes, jewelry, etc.

Fill in the amount of such purchases on which no sales and use tax was paid on line I. The system will calculate the sales and use tax.

Questions About

➤ Filing your return using TeleFile.

Contact us by e-mail at efiling@dor.state.wi.us or call (608) 264-6886.

➤ Income tax information.

Contact us by e-mail at income@dor.state.wi.us or call (608) 266-2772 or any Department of Revenue office (see page 10).

How to Get Tax Forms if You Don't Qualify to use TeleFile

Internet

Use a personal computer to visit the department's web site at:

www.dor.state.wi.us

You may download forms or request forms from our web site.

You also can e-mail your form request to:

forms@dor.state.wi.us

Note: Most public libraries have computers available to the public.

Fax

You can receive copies of forms by fax by calling (608) 261-6229 from the telephone connected to your fax machine.

Mail

You can order forms by sending your request to: Wisconsin Department of Revenue, Mail Stop 1-151, PO Box 8951, Madison WI 53708-8951.

Phone

You can request forms by calling our Madison office at (608) 266-1961 or any department office (see listing below).

Phone help is available for people who are deaf or hard-of-hearing and have TTY equipment. Call (608) 267-1049 in Madison or (414) 227-4147 in Milwaukee. These numbers are to be used only when calling with TTY equipment.

Walk-in

You can pick up forms at any department office (see listing below). Most libraries also have forms available. Libraries also have a copy of Wisconsin Package WI-X, which includes copies of Wisconsin tax forms that may be photocopied.

Wisconsin Department of Revenue Offices

If you find you need help or additional forms, these are available at any of the Department of Revenue offices listed below.

Wisconsin Department of Revenue Offices

<p>Madison – Customer assistance: 2135 Rimrock Rd. PO Box 8949 (zip code 53708-8949) Phone: (608) 266-2772 e-mail: income@dor.state.wi.us</p> <p>– Forms requests: PO Box 8951 (zip code 53708-8951) Phone: (608) 266-1961 e-mail: forms@dor.state.wi.us</p> <p>Milwaukee – State Office Bldg., 819 N. 6th St., Rm. 408 (zip code 53203-1682) income tax information (414) 227-4000 forms requests (414) 227-4440</p> <p>Appleton – 265 W. Northland Ave. (zip code 54911-2091)</p> <p>Eau Claire – State Office Bldg., 718 W. Clairemont Ave. (zip code 54701-6190) phone: (715) 836-2811</p>	<p>Other offices open on a limited schedule (generally Mondays) are:</p> <table> <tr> <td>Baraboo</td><td>Marinette</td></tr> <tr> <td>Beaver Dam</td><td>Oshkosh</td></tr> <tr> <td>Elkhorn</td><td>Racine</td></tr> <tr> <td>Fond du Lac</td><td>Rhineland</td></tr> <tr> <td>Grafton</td><td>Rice Lake</td></tr> <tr> <td>Green Bay</td><td>Sheboygan</td></tr> <tr> <td>Hayward</td><td>Superior</td></tr> <tr> <td>Hudson</td><td>Tomah</td></tr> <tr> <td>Janesville</td><td>Waukesha</td></tr> <tr> <td>Kenosha</td><td>Wausau</td></tr> <tr> <td>LaCrosse</td><td>Wisconsin Rapids</td></tr> <tr> <td>Lancaster</td><td></td></tr> </table>	Baraboo	Marinette	Beaver Dam	Oshkosh	Elkhorn	Racine	Fond du Lac	Rhineland	Grafton	Rice Lake	Green Bay	Sheboygan	Hayward	Superior	Hudson	Tomah	Janesville	Waukesha	Kenosha	Wausau	LaCrosse	Wisconsin Rapids	Lancaster	
Baraboo	Marinette																								
Beaver Dam	Oshkosh																								
Elkhorn	Racine																								
Fond du Lac	Rhineland																								
Grafton	Rice Lake																								
Green Bay	Sheboygan																								
Hayward	Superior																								
Hudson	Tomah																								
Janesville	Waukesha																								
Kenosha	Wausau																								
LaCrosse	Wisconsin Rapids																								
Lancaster																									

Form TPV – TeleFile Payment Voucher

What is Form TPV?

Form TPV is a voucher you send with your check or money order for any amount you owe on line N of your TeleFile Worksheet. Using Form TPV allows us to process your payment more accurately and efficiently.

If You Owe Money, Call Early but Pay by April 15, 2003

Payments must be made no later than April 15, 2003. If you pay late, you are subject to interest on any tax not paid by April 15, 2003.

How to Fill in Form TPV

- Fill in your name, address, and social security number. If you were married, also fill in your spouse's name and social security number.
- Fill in the amount of your payment. This is the amount from line N of your TeleFile Worksheet.
- Providing your daytime phone number may help speed processing if we have a question that can be answered over the phone. If married, you may fill in either your or your spouse's phone number.

How to Prepare Your Payment

- Make your check or money order payable to the Wisconsin Department of Revenue. **Do not send cash.**
- Make sure your name and address appear on your check or money order.
- Write your social security number on your check or money order.

How to Send in Your Payment and Form TPV

- Cut Form TPV along the dotted line.
- **Do not** staple or otherwise attach your payment to Form TPV. Instead, just put them loose in the envelope.
- Mail your payment and Form TPV to:

Wisconsin Department of Revenue
PO Box 2942
Milwaukee, WI 53201-2942

▼ Cut Here And Mail With Your Payment ▼

2002

WISCONSIN TELEFILE PAYMENT VOUCHER

CODE **5**

FORM

TPV

File only if submitting payment.
Make your check payable to and mail your voucher to:
Wisconsin Department of Revenue
Post Office Box 2942
Milwaukee, WI 53201-2942

Your last name	Your first name and initial	Your social security number 	
Spouse's last name	Spouse's first name and initial	Spouse's social security number 	
Home address (number and street or rural route)		Telephone number	
City or post office		State	Zip code

AMOUNT OF PAYMENT \$ _____
Please do not staple your payment to this voucher